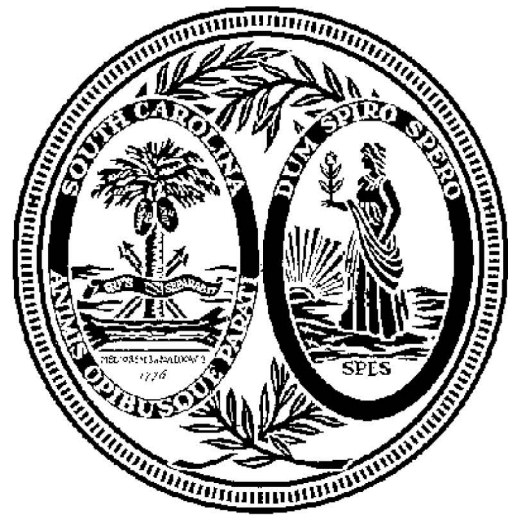


Marlboro County Base Labor Market Analysis



South Carolina
Department of
Commerce
Labor Market Information

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EXECUTIVE SUMMARY

Population

Marlboro County's population has declined in recent years.

It is expected to decline further over the next several years.

Marlboro County attracts workers mainly from within its borders.

Over 60% of Marlboro County's workers live in the county.

Income

Per capita income growth has lagged both the US and South Carolina.

Marlboro County's per capita income was below state and national levels from 1996 to 2006.

Marlboro County's average wages are below the state's average, but there is variance among various industries and occupations.

Education

The number of degrees awarded by area post-secondary institutions has increased.

The greatest increase has been in the areas of business management, health, mechanics and repair, and computer and information sciences.

Occupations

These occupational groups are expected to have faster growth in Marlboro County than in the state:

Architecture and engineering; arts, design, entertainment, sports and media; healthcare support; uilding and grounds cleaning and maintenance; personal care and service; farming and forestry; construction and extraction; installation, maintenance and repair; production; and transportation and material moving.

Requirements for Marlboro County's workers are expected to grow in the following levels of education and experience:

Moderate-term on-the-job training, work experience in a related field, and postsecondary vocational award.

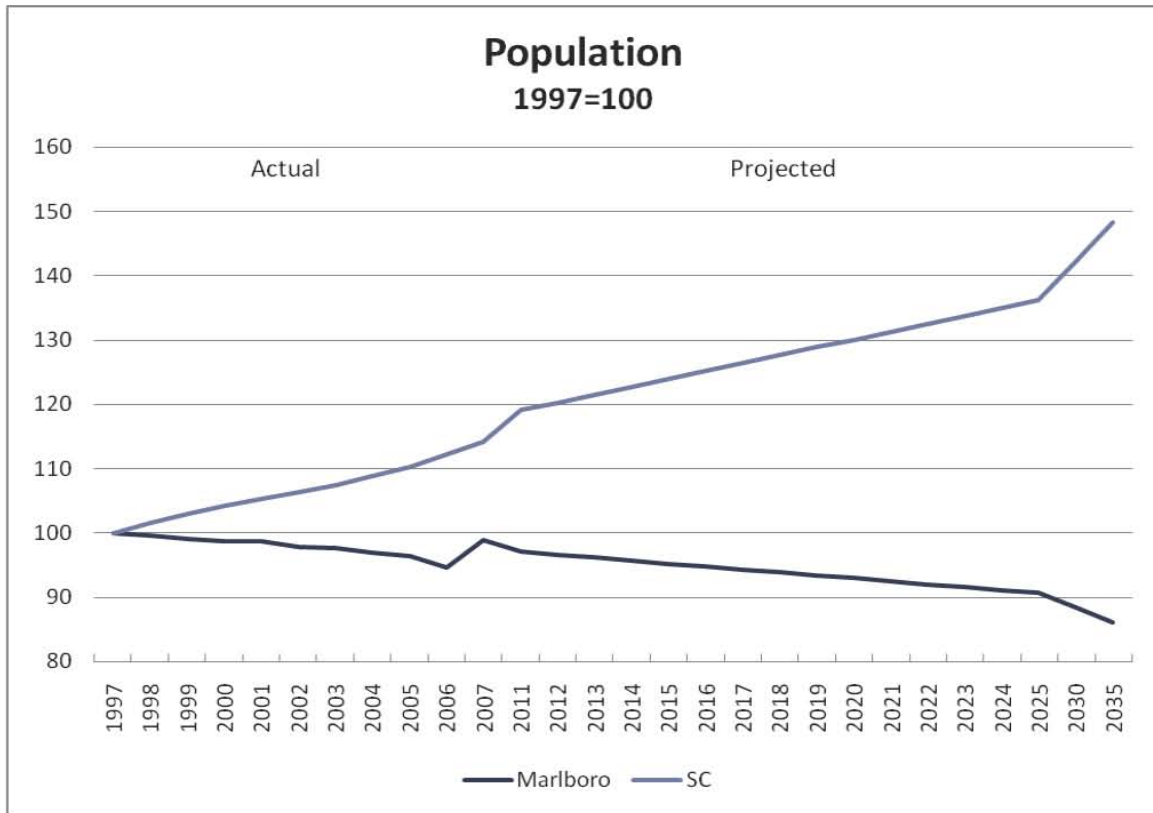
Industry

The only sector rated as having potential in Marlboro County based on available data is healthcare.

POPULATION

Growth

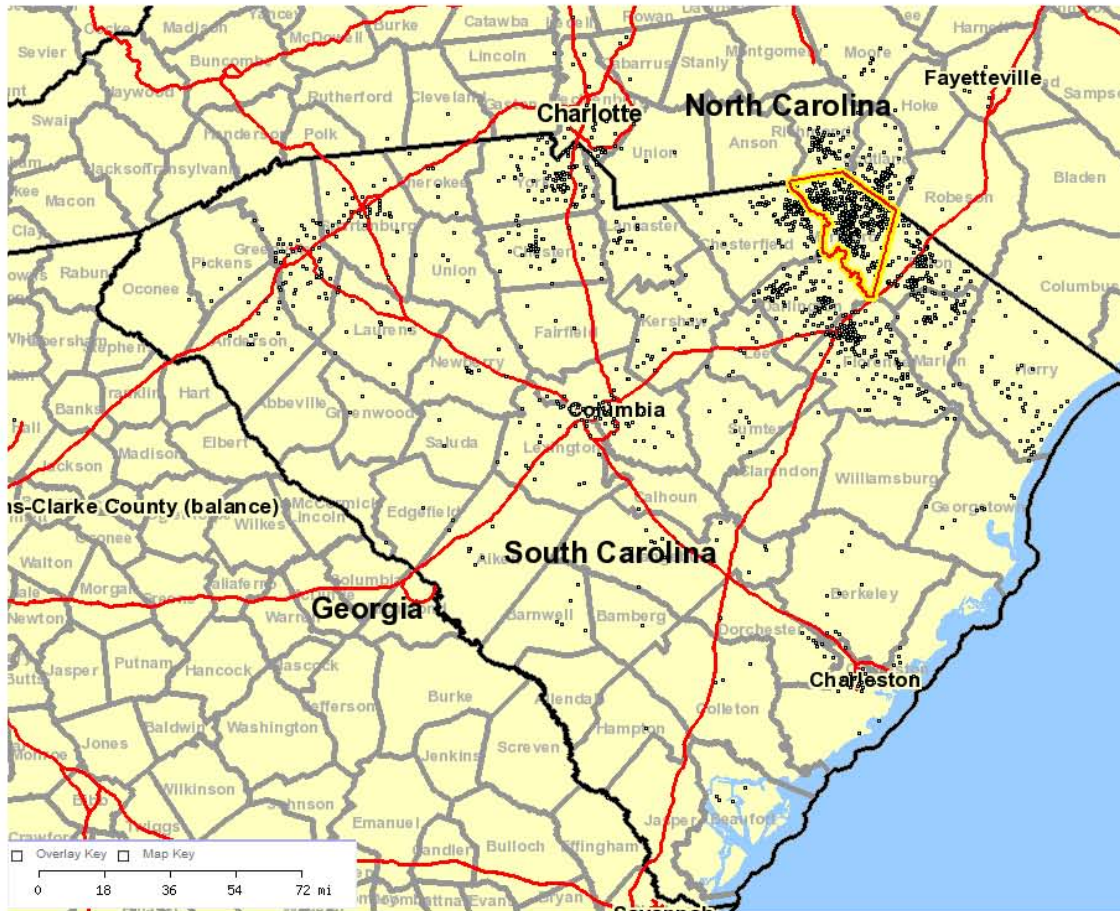
Marlboro County's 2007 population was 28,819. The county lost 1.2% of its population from 1997, compared to 14% growth for South Carolina. Marlboro's population is expected to decline further over the next several years.



Source: U.S. Census Bureau (estimates) and SC Budget & Control Board/Office of Research and Statistics (projections).

LABORSHED

The map below shows where Marlboro County workers come from (in 2004, latest available data). As can be seen, Marlboro County draws workers mainly from within its borders.



Source: U.S. Census Bureau, Local Employment Dynamics.

Characteristics of Workers

Age of Workers:

30 or younger	19.6%
31 to 54	62.7%
55 or older	17.7%

Earnings of Workers:

\$1,200 per month or less	26.6%
\$1,201 to \$3,400 per month	51.9%
More than \$3,400 per month	21.5%

States Where Workers Live:

South Carolina	91.4%
North Carolina	7.1%
All other locations	1.5%

Counties Where Workers Live:

Marlboro, South Carolina	61.1%
Chesterfield, South Carolina	7.1%
Dillon, South Carolina	4.5%
Scotland, North Carolina	3.5%
Florence, South Carolina	3.4%
Darlington, South Carolina	3.2%
Richmond, North Carolina	2.0%
York, South Carolina	1.9%
Marion, South Carolina	1.7%
Greenville, South Carolina	1.0%
All Other Locations	10.9%

Cities Where Workers Live:

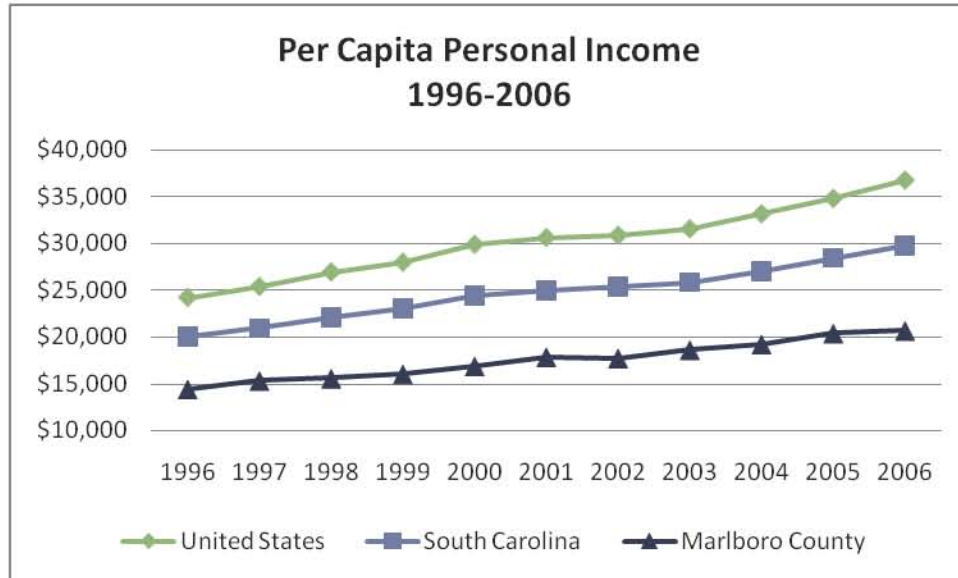
Bennettsville, South Carolina	22.9%
McColl, South Carolina	4.5%
Cheraw, South Carolina	3.4%
Laurinburg, North Carolina	1.8%
Clio, South Carolina	0.9%
Florence, South Carolina	0.8%
Dillon, South Carolina	0.5%
Rock Hill, South Carolina	0.5%
Rockingham, North Carolina	0.5%
Charlotte, North Carolina	0.4%
All Other Locations	63.8%

Source: U.S. Census Bureau, Local Employment Dynamics.

INCOME

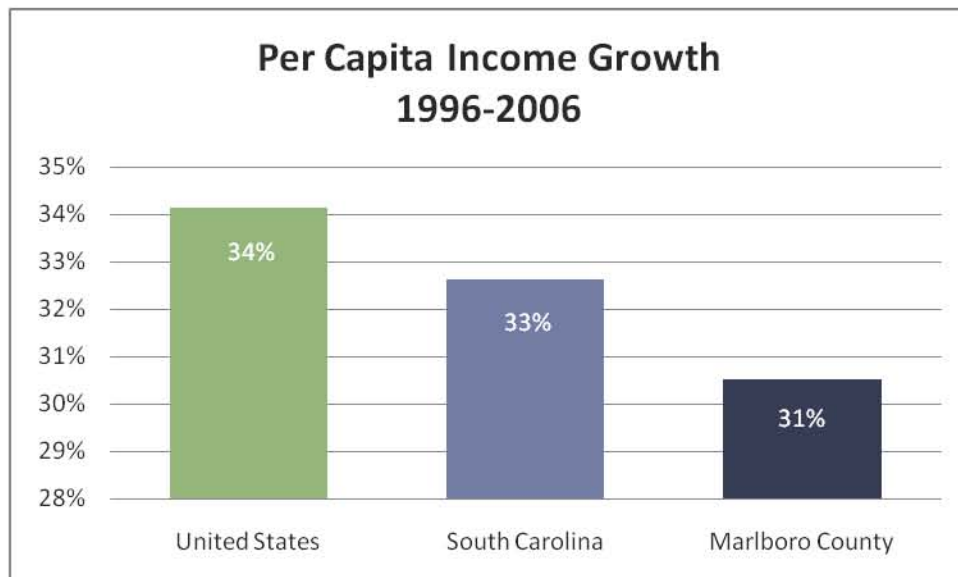
Per Capita Income

Marlboro County's per capita income has been below state and national averages from 1996 to 2006.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Marlboro County's per capita income has experienced slower growth than the state or the nation. As a result, Marlboro County lags farther behind South Carolina and the U.S. in this key measure of economic vitality.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Wages by Industry

Marlboro County's average wages are below those of South Carolina (\$620 vs. \$680 in 2007). Average wages were up 16% in Marlboro County over the past five years. All major sectors had growth except for professional and technical services.

Industry	NAICS Code	2007 Average Weekly Wage	2002 Average Weekly Wage	Change
Total, Private and Government		\$620	\$520	16%
Construction	23	453	449	1
Manufacturing	31-33	771	620	20
Wholesale Trade	42	576	418	17
Retail Trade	44-45	332	302	9
Information	51	614	526	53
Finance and Insurance	52	632	498	14
Real Estate and Rental and Leasing	53	400	347	13
Professional and Technical Services	54	448	528	-15
Administration & Support & Waste Management & Remediation Services	56	387	280	28
Arts, Entertainment, and Recreation	71	250	225	10
Accommodation and Food Services	72	184	181	2
Other Services (Except Public Administration)	81	321	301	6
Federal Government		1,017	745	27
State Government		658	583	11
Local Government		578	494	14

Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

Wages by Occupation

Average wages in Marlboro County are higher than state averages in the following occupational groups:

- Community and social services
- Protective service
- Personal care and service
- Transportation and material moving

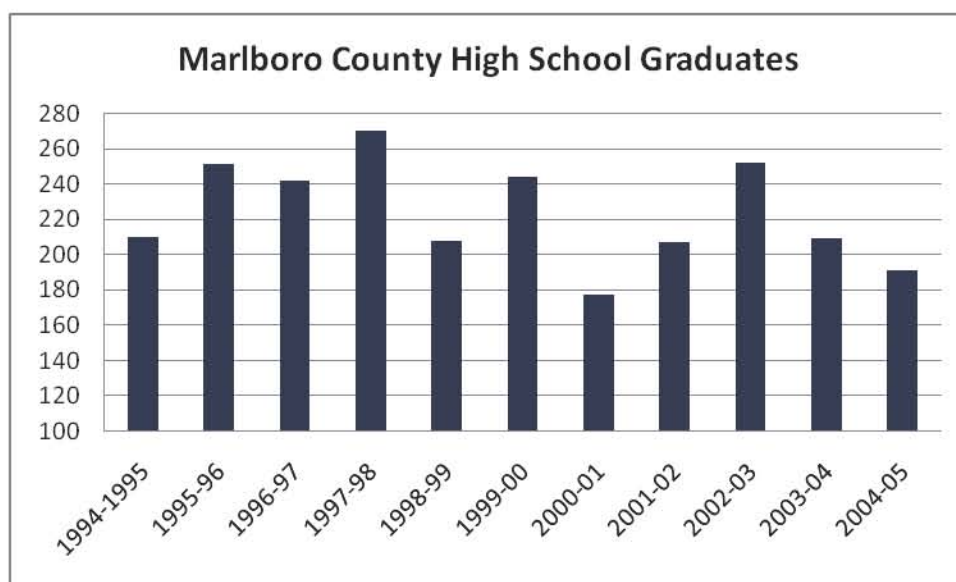
Occupation	2007 Marlboro County Median Hourly Wage	2007 SC Median Hourly Wage
Management occupations	\$25.91	\$28.78
Business and financial operations occupations	\$18.31	\$20.28
Computer and mathematical science occupations	\$24.63	\$26.20
Architecture and engineering occupations	\$28.94	\$30.22
Life, physical and social science occupations	\$21.49	\$22.76
Community and social services occupations	\$15.31	\$13.18
Legal occupations	\$22.78	\$30.68
Education, training and library occupations	\$23.20	\$24.42
Arts, design, entertainment, sports and media occupations	\$11.19	\$12.66
Healthcare practitioners and technical occupations	\$23.42	\$30.64
Healthcare support occupations	\$9.73	\$10.55
Protective service occupations	\$15.09	\$13.87
Food preparation and serving related occupations	\$7.33	\$7.90
Building and grounds cleaning and maintenance occupations	\$7.62	\$8.42
Personal care and service occupations	\$8.76	\$8.39
Sales and related occupations	\$12.76	\$13.48
Office and administrative support occupations	\$12.25	\$13.22
Farming, fishing, and forestry occupations	\$11.29	\$13.07
Construction and extraction occupations	\$13.74	\$16.51
Installation, maintenance and repair occupations	\$16.06	\$16.88
Production occupations	\$14.23	\$15.21
Transportation and material moving occupations	\$13.27	\$12.94

Source: Economic Modeling Specialists, Inc.

EDUCATION

High School Graduates

From 1995 to 2005 (latest data available), the number of Marlboro County students receiving high school diplomas fluctuated, but was lower by 19—or 9%—in 2005 than in 1995. In South Carolina, on the other hand, the number of high school diplomas increased 9% from 1995 to 2005. A total of 191 people received high school diplomas in Marlboro County in 2005. Marlboro County had 41 fewer 12th grade students in 2004-05 than in 1994-95. Also, the number of students not passing the exit exam who received a certificate of completion instead of a diploma increased by 39 (to 50) over the 1995-2005 period.



Source: National Center for Education Statistics.

Higher Education Graduates

Over 1,400 more students graduated from higher educational institutions in the Pee Dee area in 2006 than in 1996, an increase of 23%. The greatest numerical increase was in business management fields.

Program	1996	2006	Change	% Change
Business Management and Administrative Services	910	1,229	319	26%
Health Professions and Related Sciences	1,056	1,332	276	21%
Mechanics and Repairers	142	254	112	44%
Computer and Information Sciences	118	226	108	48%
Construction Trades	77	168	91	54%
Public Administration and Services	65	155	90	58%
Social Sciences and History	259	348	89	26%
Education	513	590	77	13%
Biological Science/Life Sciences	200	276	76	28%
Communications	17	73	56	77%
Liberal Arts and Studies, General Sciences and Humanities	478	530	52	10%
Parks, Recreation, Leisure and Fitness Studies	21	73	52	71%
Visual and Performing Arts	63	102	39	38%
Personal and Miscellaneous Services	48	83	35	42%
Physical Sciences	34	65	31	48%
Foreign Languages and Literatures	3	16	13	81%
Psychology	144	156	12	8%
Precision Production Trades	89	99	10	10%
Law and Legal Studies	35	44	9	20%
Protective Services	225	234	9	4%
Philosophy and Religion	6	11	5	45%
Multi/Interdisciplinary Studies	27	28	1	4%
Engineering-Related Technologies	128	121	-7	-6%
Mathematics	45	24	-21	-88%
Agricultural Business and Production	44	20	-24	-120%
English Language and Literature/Letters	114	83	-31	-37%
Total	4,861	6,340	1,479	23%

Source: National Center for Education Statistics (Integrated Post Secondary Education System).

Data for these schools: Central Carolina Technical College, Coastal Carolina University, Coker College, Florence-Darlington Technical College, Horry-Georgetown Technical College, McLeod Regional Medical Center School of Medical Technology, Morris College, Northeastern Technical College, Richmond Community College (NC), Robeson Community College (NC), South Piedmont Community College (NC), St. Andrews Presbyterian College (NC), University of North Carolina at Pembroke, University of South Carolina-Lancaster, and University of South Carolina-Sumter.

OCCUPATIONS

Occupational Projections

The following occupational groups are projected to grow faster in Marlboro County than in the state:

- Architecture and engineering
- Arts, design, entertainment, sports and media
- Healthcare support
- Building and grounds cleaning and maintenance
- Personal care and service
- Farming and forestry
- Construction and extraction
- Installation, maintenance and repair
- Production
- Transportation and material moving

See **Appendix A** for detailed occupational information.

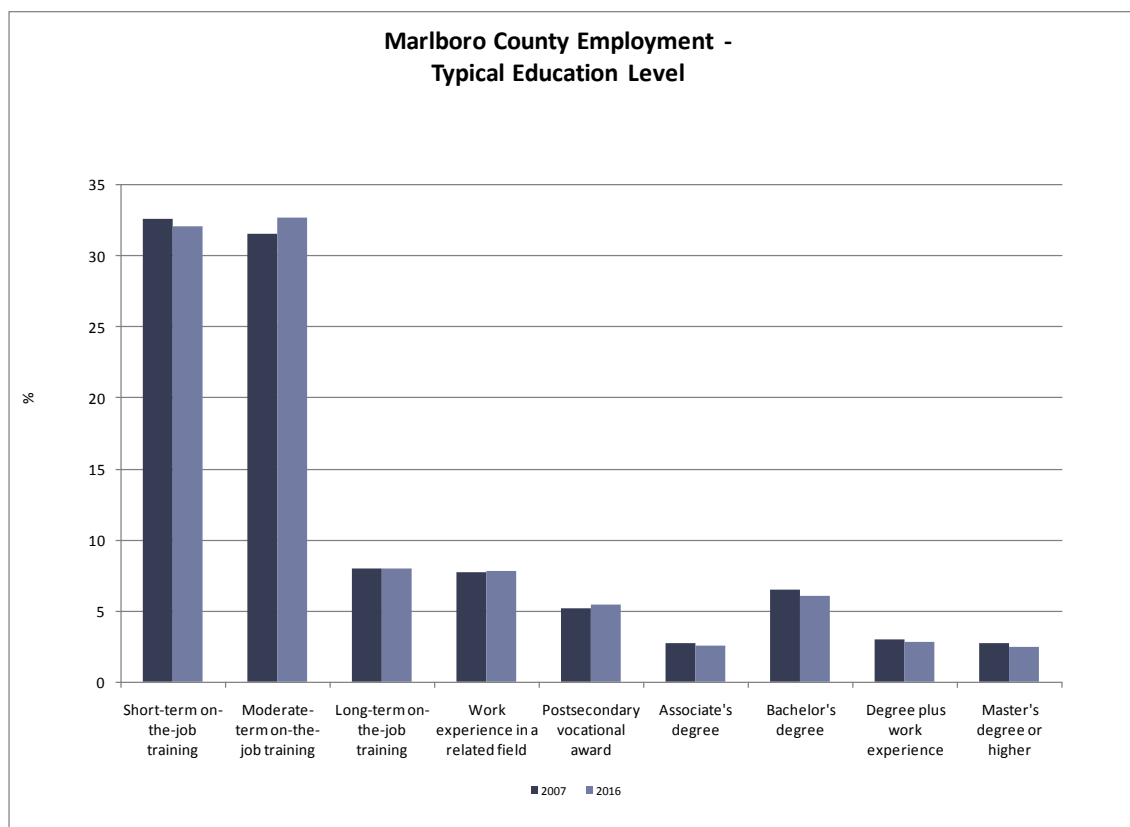
Occupation	2007-2016 Marlboro County Projected Growth	2007-2016 SC Projected Growth
Management occupations	13%	17%
Business and financial operations occupations	13	22
Computer and mathematical science occupations	13	23
Architecture and engineering occupations	19	15
Life, physical, and social science occupations	4	15
Community and social services occupations	8	15
Legal occupations	15	21
Education, training, and library occupations	7	16
Arts, design, entertainment, sports and media occupations	27	17
Healthcare practitioners and technical occupations	18	24
Healthcare support occupations	27	25
Protective service occupations	9	18
Food preparation and serving related occupations	-12	13
Building and grounds cleaning and maintenance occupations	27	23
Personal care and service occupations	26	7
Sales and related occupations	18	19
Office and administrative support occupations	12	13
Farming, fishing, and forestry occupations	27	16
Construction and extraction occupations	31	19
Installation, maintenance, and repair occupations	26	17
Production occupations	26	10
Transportation and material moving occupations	21	11

Source: Economic Modeling Specialists, Inc.

Occupational Education Requirements

The trend for occupational growth shows that the greatest increase in demand in Marlboro County will be for workers with moderate on-the-job training such as in the fields of construction, maintenance, production and transportation. Based on employment projections, Marlboro County is expected to see growth in requirements for the following levels of education and experience:

- Moderate-term on-the-job training
- Work experience in a related field
- Postsecondary vocational award



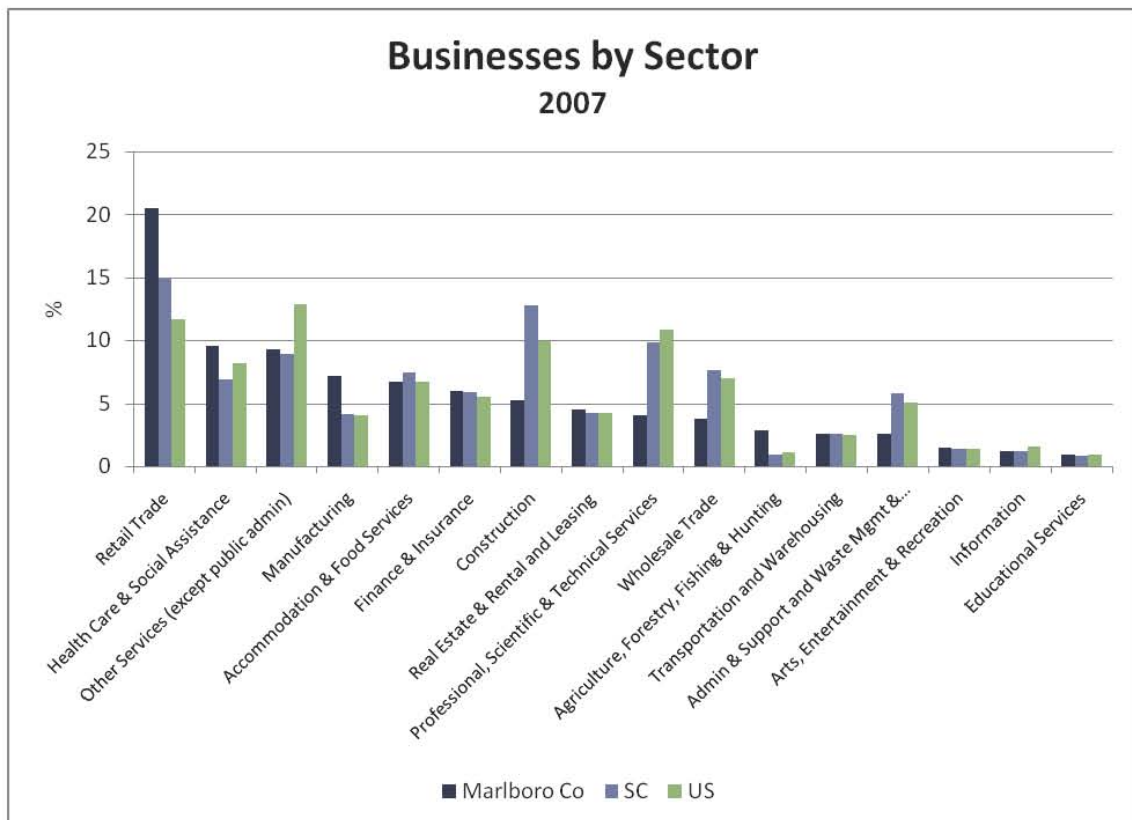
Source: Economic Modeling Specialists, Inc

INDUSTRY

Businesses by Sector

Marlboro County had higher percentages of businesses than South Carolina or the nation in the following sectors:

- Retail trade
- Health care and social assistance
- Manufacturing
- Finance and insurance
- Real estate and rental and leasing
- Agriculture, forestry and fishing
- Transportation and warehousing
- Arts, entertainment and recreation



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Growth in Number of Businesses

The number of private businesses in Marlboro County fell by 21% from 2002 to 2007, compared to a 2% drop for the state. For industry definitions, this analysis uses the North American Industry Classification System (NAICS), the U.S. standard for industry classification.

At the three-digit NAICS code level, Marlboro County had higher growth in four industries compared to South Carolina and the U.S. Below is a list of those four industries along with their respective growth rates.

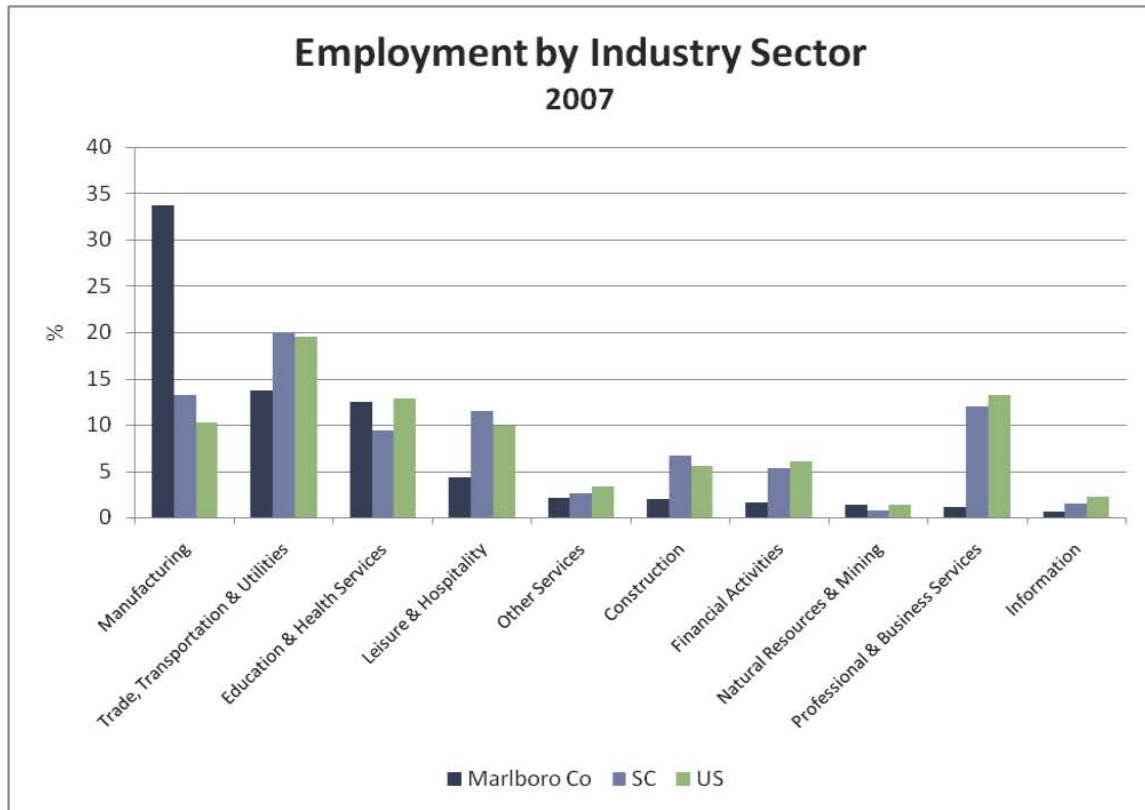
See **Appendix B** for information on all industries.

Industry	2002-2007 Growth (%)		
	Marlboro Co.	SC	US
Paper manufacturing	50.0	12.2	-7.5
Furniture and home furnishings stores	20.0	-11.3	3.8
Health and personal care stores	16.7	9.1	10.2
Warehousing and storage	33.3	-13.8	14.5

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Employment by Sector

Compared to South Carolina and the United States, Marlboro County's employment is much more concentrated in manufacturing.



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Industry Analysis

Screening Criteria

Industry sectors were rated on six factors:

- | | |
|------------------------------------|---------------------------------|
| • 2002-2007 employment growth | Competitive effect ¹ |
| • 2002-2007 employment growth rate | Average annual wage |
| • Location quotient ² | Projected growth |

Using those factors, sectors were awarded “stars” based on meeting the following criteria:

- 2002-2007 employment growth of 25 or more (Did the sector add a significant number of jobs?)
- 2002-2007 employment growth rate greater than 0% (Did the sector add jobs?)
- Location quotient of at least 1.25 (Does the sector have a significant concentration in Marlboro County?)
- Competitive effect greater than 0 (Did the sector add jobs beyond national growth overall and in the sector?)
- Average annual wage greater than \$32,217 (2007 average for Marlboro County) (Does the sector pay wages greater than average for Marlboro County?)
- Average or above average projected growth (Is the sector expected to add jobs?)

Data Limitations

Because of Census and Bureau of Labor Statistics restrictions, information on detailed industry sectors is quite limited for smaller counties such as Marlboro. Therefore, this base analysis is not as comprehensive as those for larger areas. Further analysis can be conducted on growth occupations and using other resources in an attempt to obtain more detailed information on potential focus industries for Marlboro County. The Department of Commerce can assist in this supplemental analysis.

Industries of Note

Based on these criteria, there are no “six star” sectors in Marlboro County. The only “five star” sector is ambulatory healthcare services. This sector can bring wealth into Marlboro County to the extent that the county provides medical services for those outside the county.

Industry sectors that generate wealth from outside one’s regional area are referred to as the region’s base economy. Sectors which fit this base economy criteria, have above-average wages, have a high concentration in the area (as indicated by the location quotient), and are projected to grow are worth focusing on. Based on available data, there are no sectors in Marlboro County which fit this criteria.

Appendix C has information on all factors for all sectors for Marlboro County.

¹ *Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in Marlboro County after accounting for overall US employment growth and growth/decline in the sector in the US.*

² *Location Quotient: percentage of employment in the sector in Marlboro County divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in Marlboro County compared to the US; based on 2007 data.*

MOVING FORWARD

The South Carolina Department of Commerce appreciates the opportunity to provide this base analysis of Marlboro County's labor market. We hope that it will help in advancing the progress of Marlboro County's economic development.

What's been done so far?

This analysis identifies the region's assets—both current and future—at a macro level. Labor Market Information (LMI) at the S.C. Department of Commerce developed a Base Labor Analysis report providing an overview of the region's population, industries, occupations, and educational assets. Additionally, these findings were benchmarked against the state and the nation.

What's next?

Because local knowledge is required to interpret and apply the findings appropriately, the Marlboro Base Labor Analysis should be used with local stakeholders to identify and define key, targeted industry clusters. Some items to consider when defining these clusters may include the following.

1. *What is Marlboro's economic base?*

In order for an economy to grow, it must have a base (export) sector that generates wealth from beyond its borders. Industries in the economic base (manufacturing, scientific and technology services, warehouse and distribution, financial services, regional healthcare, etc.) typically provide occupations with higher pay and benefits as well as better human capital development and promotion opportunities. A successful economic base stimulates the development of the non-base sector (housing, schools, retail, restaurants, personal services, etc.). It also propels the local tax base which, in turn, provides support to community services.

2. *What are strategies to assist low-wage citizens in non-base economy jobs?*

Although the economic base is the driver for long-term growth in a region, implementable strategies for developing job opportunities for low-skilled individuals is a priority for community economic well-being. This need must also be kept in mind when defining target industry clusters.

3. *What other factors are vital to Marlboro and its community?*

Over and above pure economic considerations, what is important to the citizens of the Marlboro community? How does Marlboro want to be perceived? What quality of life issues affect Marlboro? These questions may impact the types of industries desired for the area.

How Labor Market Information at the S.C. Department of Commerce can help.

Once local stakeholders have identified key industry clusters vital to the future economic development of the region, LMI can provide more in-depth analysis of each of these industries, their occupations, business establishments, and educational requirements.

1. Detailed Industry Analysis

For each identified industry, LMI can develop a detailed analysis of each sector, including employment, projected growth, staffing patterns, location quotients, and employers. Additionally, the analysis will examine the largest, fastest growing, and declining sectors within the industry cluster.

2. Detailed Occupational Analysis

At this point, the occupations—classified by SOC codes—that make up each of the identified industry clusters can be analyzed in detail. This analysis will include employment, average earnings, educational requirements, projected growth, and completers from available local training programs. It will culminate in identifying gaps between the number of occupations required to sustain and advance industry growth and the number of skilled workers (as identified by educational requirements and program completers) available to fulfill these positions.

3. Identification of Implementable Recommendations

LMI will utilize the findings of the analyses to develop a set of implementable recommendations. These may include recommendations to align community college programs with economic development goals along with others. Finally, local knowledge will once again be called upon to review the findings and develop an action plan for the implementation of feasible solutions.

Appendix A: Occupational Projections for Marlboro County

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Training Level
11-1011	Chief executives	36	43	7	19	0.58	54.34	Degree plus work experience
11-1021	General and operations managers	82	92	10	12	0.80	34.10	Degree plus work experience
11-1031	Legislators	16	16	0	0	4.49	8.85	Degree plus work experience
11-3031	Financial managers	19	23	4	21	0.50	21.74	Degree plus work experience
11-3051	Industrial production managers	20	26	6	30	2.33	37.13	Work experience in a related field
11-9011	Farm, ranch, and other agricultural managers	37	37	0	0	1.93	5.86	Degree plus work experience
11-9012	Farmers and ranchers	183	184	1	1	1.93	5.85	Long-term on-the-job training
11-9021	Construction managers	22	29	7	32	0.52	15.34	Bachelor's degree
11-9032	Education administrators, elementary and secondary school	17	18	1	6	1.05	42.21	Degree plus work experience
11-9051	Food service managers	27	40	13	48	1.07	8.39	Work experience in a related field
11-9111	Medical and health services managers	17	20	3	18	1.00	37.74	Degree plus work experience
11-9141	Property, real estate, and community association managers	17	27	10	59	0.26	7.40	Bachelor's degree
11-9199	Managers, all other	30	38	8	27	0.34	133.45	Work experience in a related field
13-1023	Purchasing agents, except wholesale, retail, and farm products	13	15	2	15	0.79	22.19	Work experience in a related field
13-1031	Claims adjusters, examiners, and investigators	14	15	1	7	0.83	20.93	Long-term on-the-job training
13-1041	Compliance officers, except agriculture, construction, health and safety, and transportation	10	10	0	0	--	--	Long-term on-the-job training
13-1111	Management analysts	16	17	1	6	0.29	23.46	Degree plus work experience
13-1199	Business operation specialists, all other	14	16	2	14	0.24	21.89	Bachelor's degree

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Training Level
13-2011	Accountants and auditors	34	40	6	18	0.40	14.79	Bachelor's degree
17-2112	Industrial engineers	15	22	7	47	1.32	26.73	Bachelor's degree
17-2141	Mechanical engineers	17	18	1	6	1.35	36.73	Bachelor's degree
17-3023	Electrical and electronic engineering technicians	14	17	3	21	1.41	26.99	Associate's degree
17-3026	Industrial engineering technicians	11	14	3	27	2.71	17.13	Associate's degree
21-1012	Educational, vocational, and school counselors	23	24	1	4	1.58	20.54	Master's degree
21-1015	Rehabilitation counselors	21	24	3	14	2.52	14.25	Master's degree
21-1021	Child, family, and school social workers	36	38	2	6	2.16	15.07	Bachelor's degree
21-1023	Mental health and substance abuse social workers	12	14	2	17	1.64	14.45	Master's degree
21-1092	Probation officers and correctional treatment specialists	12	12	0	0	2.35	19.45	Bachelor's degree
21-1093	Social and human service assistants	37	42	5	14	1.85	11.34	Moderate-term on-the-job training
21-2011	Clergy	14	13	-1	-7	0.99	11.13	Master's degree
23-1011	Lawyers	23	28	5	22	0.49	24.96	First professional degree
23-1023	Judges, magistrate judges, and magistrates	12	12	0	0	8.43	22.81	Degree plus work experience
25-1099	Postsecondary teachers	48	53	5	10	0.56	41.17	Doctoral degree
25-2011	Preschool teachers, except special education	13	11	-2	-15	0.44	11.96	Postsecondary vocational award
25-2012	Kindergarten teachers, except special education	32	35	3	9	3.08	28.43	Bachelor's degree
25-2021	Elementary school teachers, except special education	145	158	13	9	1.57	26.32	Bachelor's degree
25-2022	Middle school teachers, except special and vocational education	54	58	4	7	1.34	24.54	Bachelor's degree
25-2031	Secondary school teachers, except special and vocational education	66	68	2	3	1.08	26.41	Bachelor's degree
25-2041	Special education teachers, preschool, kindergarten, and elementary school	17	19	2	12	1.33	27.31	Bachelor's degree
25-3099	Teachers and instructors, all other	23	25	2	9	0.62	19.14	Bachelor's degree
25-4021	Librarians	10	10	0	0	--	--	Master's degree

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Training Level
25-9041	Teacher assistants	112	114	2	2	1.42	9.80	Short-term on-the-job training
27-4021	Photographers	12	12	0	0	0.30	6.75	Long-term on-the-job training
29-1051	Pharmacists	12	13	1	8	0.89	50.95	First professional degree
29-1069	Physicians and surgeons	44	48	4	9	0.96	76.98	First professional degree
29-1111	Registered nurses	148	170	22	15	1.07	23.12	Associate's degree
29-1127	Speech-language pathologists	17	18	1	6	2.40	22.87	Master's degree
29-2011	Medical and clinical laboratory technologists	10	10	0	0	--	--	Bachelor's degree
29-2012	Medical and clinical laboratory technicians	19	20	1	5	2.29	12.61	Associate's degree
29-2034	Radiologic technologists and technicians	18	19	1	6	1.69	20.43	Associate's degree
29-2041	Emergency medical technicians and paramedics	93	138	45	48	8.32	8.11	Postsecondary vocational award
29-2052	Pharmacy technicians	24	27	3	13	1.49	12.63	Moderate-term on-the-job training
29-2061	Licensed practical and licensed vocational nurses	101	116	15	15	2.44	16.11	Postsecondary vocational award
29-2071	Medical records and health information technicians	15	16	1	7	1.55	9.60	Associate's degree
31-1011	Home health aides	57	91	34	60	1.21	7.49	Short-term on-the-job training
31-1012	Nursing aides, orderlies, and attendants	116	136	20	17	1.42	8.98	Postsecondary vocational award
31-9091	Dental assistants	15	17	2	13	0.92	17.53	Moderate-term on-the-job training
31-9092	Medical assistants	15	20	5	33	0.61	9.98	Moderate-term on-the-job training
33-2011	Fire fighters	11	12	1	9	0.69	19.04	Long-term on-the-job training
33-3012	Correctional officers and jailers	192	210	18	9	8.15	14.89	Moderate-term on-the-job training
33-3051	Police and sheriff's patrol officers	63	67	4	6	1.74	15.26	Long-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Training Level
33-9032	Security guards	17	19	2	12	0.30	7.72	Short-term on-the-job training
35-1012	First-line supervisors/managers of food preparation and serving workers	43	37	-6	-14	0.89	10.50	Work experience in a related field
35-2011	Cooks, fast food	78	61	-17	-22	2.21	6.30	Short-term on-the-job training
35-2012	Cooks, institution and cafeteria	41	42	1	2	1.80	7.85	Moderate-term on-the-job training
35-2021	Food preparation workers	28	28	0	0	0.56	7.70	Short-term on-the-job training
35-3021	Combined food preparation and serving workers, including fast food	116	103	-13	-11	0.83	6.96	Short-term on-the-job training
35-3031	Waiters and waitresses	42	31	-11	-26	0.32	6.36	Short-term on-the-job training
35-3041	Food servers, nonrestaurant	12	12	0	0	1.14	7.95	Short-term on-the-job training
37-1011	First-line supervisors/managers of housekeeping and janitorial workers	14	17	3	21	0.66	10.09	Work experience in a related field
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	91	104	13	14	0.71	8.56	Short-term on-the-job training
37-2012	Maids and housekeeping cleaners	154	206	52	34	1.51	6.42	Short-term on-the-job training
37-2019	Building cleaning workers, all other	18	25	7	39	0.66	5.85	Short-term on-the-job training
37-2021	Pest control workers	13	20	7	54	2.53	9.73	Moderate-term on-the-job training
37-3011	Landscaping and groundskeeping workers	39	44	5	13	0.67	9.15	Short-term on-the-job training
39-2011	Animal trainers	10	10	0	0	1.90	7.84	Moderate-term on-the-job training
39-2021	Nonfarm animal caretakers	14	12	-2	-14	0.66	8.77	Short-term on-the-job training
39-4021	Funeral attendants	12	11	-1	-8	6.54	10.85	Short-term on-the-job training
39-9011	Child care workers	71	91	20	28	0.77	6.07	Short-term on-the-job training
39-9021	Personal and home care aides	92	141	49	53	1.90	9.22	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Training Level
39-9032	Recreation workers	11	12	1	9	0.55	10.64	Short-term on-the-job training
41-1011	First-line supervisors/managers of retail sales workers	170	197	27	16	1.36	16.84	Work experience in a related field
41-1012	First-line supervisors/managers of non-retail sales workers	24	26	2	8	0.45	20.85	Work experience in a related field
41-2011	Cashiers, except gaming	274	291	17	6	1.38	6.46	Short-term on-the-job training
41-2021	Counter and rental clerks	24	36	12	50	0.89	7.68	Short-term on-the-job training
41-2022	Parts salespersons	27	33	6	22	2.05	10.25	Moderate-term on-the-job training
41-2031	Retail salespersons	134	159	25	19	0.48	9.61	Short-term on-the-job training
41-3021	Insurance sales agents	27	24	-3	-11	0.66	9.70	Bachelor's degree
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	83	120	37	45	0.91	30.71	Moderate-term on-the-job training
41-9021	Real estate brokers	26	43	17	65	0.27	5.94	Work experience in a related field
41-9022	Real estate sales agents	31	48	17	55	0.30	6.59	Postsecondary vocational award
41-9091	Door-to-door sales workers, news and street vendors, and related workers	26	23	-3	-12	0.41	5.87	Short-term on-the-job training
43-1011	First-line supervisors/managers of office and administrative support workers	60	66	6	10	0.70	17.64	Work experience in a related field
43-3011	Bill and account collectors	10	13	3	30	--	--	Short-term on-the-job training
43-3021	Billing and posting clerks and machine operators	31	37	6	19	1.03	11.06	Moderate-term on-the-job training
43-3031	Bookkeeping, accounting, and auditing clerks	85	100	15	18	0.67	11.87	Moderate-term on-the-job training
43-3051	Payroll and timekeeping clerks	12	13	1	8	0.97	14.52	Moderate-term on-the-job training
43-4051	Customer service representatives	43	57	14	33	0.34	13.31	Moderate-term on-the-job training
43-4111	Interviewers, except eligibility and loan	13	13	0	0	0.96	9.21	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Training Level
43-4161	Human resources assistants, except payroll and timekeeping	13	14	1	8	1.37	17.79	Short-term on-the-job training
43-4171	Receptionists and information clerks	31	38	7	23	0.47	9.08	Short-term on-the-job training
43-5021	Couriers and messengers	10	15	5	50	--	--	Short-term on-the-job training
43-5031	Police, fire, and ambulance dispatchers	12	13	1	8	2.06	10.15	Moderate-term on-the-job training
43-5032	Dispatchers, except police, fire, and ambulance	10	10	0	0	--	--	Moderate-term on-the-job training
43-5041	Meter readers, utilities	12	13	1	8	4.60	11.77	Short-term on-the-job training
43-5052	Postal service mail carriers	25	25	0	0	1.36	20.81	Short-term on-the-job training
43-5061	Production, planning, and expediting clerks	19	24	5	26	1.16	15.87	Short-term on-the-job training
43-5071	Shipping, receiving, and traffic clerks	36	46	10	28	0.83	13.74	Short-term on-the-job training
43-5081	Stock clerks and order fillers	73	75	2	3	0.75	8.92	Short-term on-the-job training
43-6011	Executive secretaries and administrative assistants	37	41	4	11	0.39	16.09	Moderate-term on-the-job training
43-6012	Legal secretaries	13	14	1	8	0.62	13.41	Postsecondary vocational award
43-6013	Medical secretaries	29	34	5	17	1.07	10.59	Postsecondary vocational award
43-6014	Secretaries, except legal, medical, and executive	110	112	2	2	0.97	12.35	Moderate-term on-the-job training
43-9061	Office clerks, general	139	159	20	14	0.76	10.06	Short-term on-the-job training
45-2091	Agricultural equipment operators	17	22	5	29	10.22	9.92	Moderate-term on-the-job training
45-2092	Farmworkers and laborers, crop, nursery, and greenhouse	45	58	13	29	2.67	8.68	Short-term on-the-job training
47-1011	First-line supervisors/managers of construction trades and extraction workers	34	44	10	29	0.55	16.91	Work experience in a related field

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Training Level
47-2031	Carpenters	49	63	14	29	0.50	12.76	Long-term on-the-job training
47-2061	Construction laborers	28	38	10	36	0.35	10.24	Moderate-term on-the-job training
47-2073	Operating engineers and other construction equipment operators	32	43	11	34	1.33	14.39	Moderate-term on-the-job training
47-2111	Electricians	29	36	7	24	0.69	16.22	Long-term on-the-job training
47-2141	Painters, construction and maintenance	16	20	4	25	0.48	11.52	Moderate-term on-the-job training
47-2151	Pipelayers	17	27	10	59	2.70	12.91	Moderate-term on-the-job training
47-2152	Plumbers, pipefitters, and steamfitters	13	17	4	31	0.47	15.82	Long-term on-the-job training
49-1011	First-line supervisors/managers of mechanics, installers, and repairers	35	42	7	20	1.33	22.84	Work experience in a related field
49-3021	Automotive body and related repairers	13	16	3	23	1.20	8.87	Long-term on-the-job training
49-3023	Automotive service technicians and mechanics	20	24	4	20	0.44	19.17	Postsecondary vocational award
49-3031	Bus and truck mechanics and diesel engine specialists	16	18	2	13	0.98	16.21	Postsecondary vocational award
49-9021	Heating, air conditioning, and refrigeration mechanics and installers	11	13	2	18	0.58	14.46	Long-term on-the-job training
49-9041	Industrial machinery mechanics	59	87	28	47	3.98	18.55	Long-term on-the-job training
49-9042	Maintenance and repair workers, general	185	228	43	23	2.32	14.24	Moderate-term on-the-job training
49-9043	Maintenance workers, machinery	24	32	8	33	5.29	16.11	Short-term on-the-job training
49-9098	Helpers--Installation, maintenance, and repair workers	27	35	8	30	3.00	12.18	Short-term on-the-job training
51-1011	First-line supervisors/managers of production and operating workers	116	149	33	28	2.92	24.58	Work experience in a related field
51-2092	Team assemblers	288	342	54	19	4.07	12.03	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Training Level
51-4031	Cutting, punching, and press machine setters, operators, and tenders, metal and plastic	41	43	2	5	2.66	13.38	Moderate-term on-the-job training
51-4041	Machinists	19	25	6	32	0.88	21.22	Long-term on-the-job training
51-4072	Molding, coremaking, and casting machine setters, operators, and tenders, metal and plastic	33	35	2	6	3.79	10.04	Moderate-term on-the-job training
51-4081	Multiple machine tool setters, operators, and tenders, metal and plastic	11	12	1	9	2.01	13.43	Moderate-term on-the-job training
51-4111	Tool and die makers	12	14	2	17	2.17	22.92	Long-term on-the-job training
51-4121	Welders, cutters, solderers, and brazers	33	41	8	24	1.47	14.00	Long-term on-the-job training
51-5021	Job printers	11	17	6	55	3.87	15.86	Long-term on-the-job training
51-5023	Printing machine operators	54	72	18	33	4.74	15.87	Moderate-term on-the-job training
51-6011	Laundry and dry-cleaning workers	16	19	3	19	1.04	8.81	Moderate-term on-the-job training
51-6021	Pressers, textile, garment, and related materials	22	25	3	14	4.95	11.24	Short-term on-the-job training
51-6031	Sewing machine operators	21	30	9	43	1.52	12.91	Moderate-term on-the-job training
51-6061	Textile bleaching and dyeing machine operators and tenders	48	54	6	13	41.76	11.82	Moderate-term on-the-job training
51-6062	Textile cutting machine setters, operators, and tenders	12	16	4	33	10.53	10.62	Moderate-term on-the-job training
51-6063	Textile knitting and weaving machine setters, operators, and tenders	38	44	6	16	16.85	11.12	Long-term on-the-job training
51-6064	Textile winding, twisting, and drawing out machine setters, operators, and tenders	442	570	128	29	174.13	10.41	Moderate-term on-the-job training
51-6091	Extruding and forming machine setters, operators, and tenders, synthetic and glass fibers	12	16	4	33	12.35	14.93	Moderate-term on-the-job training
51-8013	Power plant operators	18	26	8	44	9.10	27.25	Long-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Training Level
51-8031	Water and liquid waste treatment plant and system operators	22	26	4	18	3.67	18.75	Long-term on-the-job training
51-8091	Chemical plant and system operators	49	67	18	37	16.24	23.71	Long-term on-the-job training
51-9011	Chemical equipment operators and tenders	14	16	2	14	4.79	20.15	Moderate-term on-the-job training
51-9023	Mixing and blending machine setters, operators, and tenders	40	56	16	40	5.04	17.57	Moderate-term on-the-job training
51-9032	Cutting and slicing machine setters, operators, and tenders	26	37	11	42	5.90	17.25	Moderate-term on-the-job training
51-9041	Extruding, forming, pressing, and compacting machine setters, operators, and tenders	21	31	10	48	4.47	16.87	Moderate-term on-the-job training
51-9051	Furnace, kiln, oven, drier, and kettle operators and tenders	10	16	6	60	6.79	13.05	Moderate-term on-the-job training
51-9061	Inspectors, testers, sorters, samplers, and weighers	125	151	26	21	4.49	11.53	Moderate-term on-the-job training
51-9111	Packaging and filling machine operators and tenders	38	46	8	21	1.77	9.87	Short-term on-the-job training
51-9121	Coating, painting, and spraying machine setters, operators, and tenders	52	64	12	23	8.67	11.98	Moderate-term on-the-job training
51-9196	Paper goods machine setters, operators, and tenders	129	182	53	41	20.19	18.15	Moderate-term on-the-job training
51-9198	Helpers--Production workers	143	185	42	29	4.67	12.15	Short-term on-the-job training
51-9199	Production workers, all other	32	41	9	28	1.93	18.31	Moderate-term on-the-job training
53-1021	First-line supervisors/managers of helpers, laborers, and material movers, hand	17	23	6	35	1.62	24.44	Work experience in a related field
53-1031	First-line supervisors/managers of transportation and material-moving machine and vehicle operators	12	15	3	25	0.94	28.76	Work experience in a related field
53-3021	Bus drivers, transit and intercity	26	29	3	12	2.23	9.97	Moderate-term on-the-job training
53-3022	Bus drivers, school	30	31	1	3	1.11	7.87	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Training Level
53-3031	Driver/sales workers	34	43	9	26	0.95	12.41	Short-term on-the-job training
53-3032	Truck drivers, heavy and tractor-trailer	89	111	22	25	0.83	13.96	Moderate-term on-the-job training
53-3033	Truck drivers, light or delivery services	98	132	34	35	1.47	10.39	Short-term on-the-job training
53-7011	Conveyor operators and tenders	12	15	3	25	4.63	15.11	Short-term on-the-job training
53-7051	Industrial truck and tractor operators	90	108	18	20	2.49	14.92	Short-term on-the-job training
53-7061	Cleaners of vehicles and equipment	17	20	3	18	0.82	9.81	Short-term on-the-job training
53-7062	Laborers and freight, stock, and material movers, hand	240	293	53	22	1.75	13.64	Short-term on-the-job training
53-7063	Machine feeders and offbearers	26	32	6	23	3.16	12.72	Short-term on-the-job training
53-7064	Packers and packagers, hand	73	75	2	3	1.55	9.55	Short-term on-the-job training
		9,727	11,478	1,751	18		15.15	

at least 1.25 greater than \$15.15

Source: EMSI

Appendix B: Businesses by 3-Digit NAICS Codes

Marlboro County								
Industry	NAICS Code	Change						
		2002	2007	Average Size	#	%	SC % change	US % change
Crop Production	111	8	8	7	0	0.0	-17.6	-9.3
Support Activities for Agriculture and Forestry	115	5	3	6	-2	-40.0	-13.0	1.8
Specialty Trade Contractors	238	29	16	6	-13	-44.8	-6.4	12.9
Wood Product Manufacturing	321	3	3		0	0.0	-6.4	-5.7
Paper Manufacturing	322	4	6		2	50.0	12.2	-7.5
Motor Vehicle and Parts Dealers	441	16	12	8	-4	-25.0	-11.6	2.2
Furniture and Home Furnishings Stores	442	5	6	4	1	20.0	-11.3	3.8
Building Material and Garden Equipment and Supplies Dealers	444	7	3	10	-4	-57.1	-8.8	0.9
Food and Beverage Stores	445	27	19	14	-8	-29.6	-18.2	-0.5
Health and Personal Care Stores	446	6	7	8	1	16.7	9.1	10.2
Gasoline Stations	447	23	18	6	-5	-21.7	-2.8	-1.9
Clothing and Clothing Accessories Stores	448	6	6	6	0	0.0	-5.3	4.6
General Merchandise Stores	452	8	9	7	1	12.5	17.5	13.3
Miscellaneous Store Retailers	453	7	4	3	-3	-42.9	-23.9	-8.6
Truck Transportation	484	8	5	4	-3	-37.5	-5.1	5.4
Warehousing and Storage	493	3	4	15	1	33.3	-13.8	14.5
Credit Intermediation and Related Activities	522	17	17	3	0	0.0	12.2	23.8
Insurance Carriers and Related Activities	524	9	7		-2	-22.2	0.3	6.7
Real Estate	531	14	16	2	2	14.3	18.8	23.8
Rental and Leasing Services	532	4	3	5	-1	-25.0	-8.3	1.7
Professional, Scientific, and Technical Services	541	19	17	3	-2	-10.5	2.1	14.3
Administrative and Support Services	561	13	11	3	-2	-15.4	2.2	13.0
Ambulatory Health Care Services	621	26	26	13	0	0.0	7.4	13.3
Nursing and Residential Care Facilities	623	4	4	59	0	0.0	0.4	8.8
Social Assistance	624	14	9	10	-5	-35.7	-5.0	29.4
Amusement, Gambling, and Recreation Industries	713	12	6	5	-6	-50.0	-14.4	12.9
Accommodation	721	8	6	6	-2	-25.0	-3.4	3.5
Food Services and Drinking Places	722	32	22	12	-10	-31.3	-0.2	12.2
Repair and Maintenance	811	18	8	8	-10	-55.6	-18.3	-0.4
Personal and Laundry Services	812	10	9	4	-1	-10.0	-2.4	7.2

Marlboro County								
					Change			
Industry	NAICS Code	2002	2007	Average Size	#	%	SC % change	US % change
Religious, Grantmaking, Civic, Professional, and Similar Organizations	813	7	6		-1	-14.3	-2.0	3.3
Private Households	814	30	16		-14	-46.7	4.6	24.9

growth rate exceeds both SC and US growth rates

Source: Bureau of Labor Statistics

Appendix C: Marlboro County Employment by Industry Sector

Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage	Projected Growth
		2002	2007	#	%				
Total		7,807	7,446	-361	-4.6			32,217	18%

<i>6 star sectors</i>									
Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage	Projected Growth
		2002	2007	#	%				
NONE									

<i>5 star sectors</i>									
Industry	NAICS code	Employment		1997-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage	Projected Growth
		2002	2007	#	%				
Ambulatory Health Care Services	621	174	335	161	92.5	1.28	130	NA	AA

<i>4 star sectors</i>									
Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage	Projected Growth
		2002	2007	#	%				
Food and Beverage Stores	445	202	263	61	30.2	1.93	63	NA	BA
Nursing and Residential Care Facilities	623	215	235	20	9.3	1.67	4	NA	AA

<i>3 star or fewer sectors</i>									
Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage	Projected Growth
		2002	2007	#	%				
Furniture and Home Furnishings Stores	442	14	22	8	57.1	0.81	7	22,946	A
Gasoline Stations	447	113	110	-3	-2.7	2.68	1	NA	A
Clothing and Clothing Accessories Stores	448	20	37	17	85.0	0.52	14	25,324	A
Repair and Maintenance	811	31	67	36	116.1	1.12	36	NA	BA
Motor Vehicle and Parts Dealers	441	86	90	4	4.7	0.99	3	NA	BA
Health and Personal Care Stores	446	39	53	14	35.9	1.12	11	NA	BA

3 star or fewer sectors		Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage	Projected Growth
Industry	NAICS code	2002	2007	#	%				
General Merchandise Stores	452	59	62	3	5.1	0.43	-1	NA	A
Truck Transportation	484	12	18	6	50.0	0.26	5	24,556	BA
Warehousing and Storage	493	60	60	0	0.0	1.91	-17	NA	AA
Support Activities for Agriculture and Forestry	115	24	18	-6	-25.0	1.14	-8	NA	A
Specialty Trade Contractors	238	120	91	-29	-24.2	0.40	-47	NA	A
Real Estate	531	43	32	-11	-25.6	0.45	-15	NA	AA
Rental and Leasing Services	532	26	16	-10	-38.5	0.53	-9	NA	A
Professional, Scientific, and Technical Services	541	60	52	-8	-13.3	0.14	-17	NA	A
Social Assistance	624	96	91	-5	-5.2	0.84	-23	NA	A
Building Material and Garden Equipment and Supplies Dealers	444	42	29	-13	-31.0	0.47	-18	NA	BA
Miscellaneous Store Retailers	453	18	13	-5	-27.8	0.31	-3	NA	D
Credit Intermediation and Related Activities	522	60	53	-7	-11.7	0.39	-11	NA	BA
Amusement, Gambling, and Recreation Industries	713	34	32	-2	-5.9	0.47	-5	NA	BA
Accommodation	721	43	33	-10	-23.3	0.37	-12	NA	BA
Food Services and Drinking Places	722	315	254	-61	-19.4	0.56	-102	NA	BA
Personal and Laundry Services	812	36	35	-1	-2.8	0.56	-2	NA	D

Methodology and Sourcing

Projected Growth Grading Scale:

AA=above average

A=average

BA=below average

D=decline

Sectors are rated on 6 factors: 2002-2007 employment growth, 2002-2007 employment growth rate, location quotient, competitive effect, average annual wage, and projected growth.

Stars are based on: 2002-2007 employment growth of 25 or more, 2002-2007 employment growth rate greater than 0% (since total employment in Marlboro County declined), location quotient of at least 1.25, competitive effect greater than 0, average annual wage greater than \$32,217 (2007 average for all jobs in Marlboro County), and average or above average projected growth.

Location Quotient: percentage of employment in the sector in Marlboro County divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in Marlboro County; based on 2007 data.

Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in Marlboro County after accounting for overall US employment growth and growth/decline in the sector in the US.

Source: Bureau of Labor Statistics; projections based on data from EMSI and SC Department of Commerce.



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